Create Consent through Process Builders

 Under Setup, click Process Builder and then click New. The New Process pop-up window appears

Process Name*	API Name*	
1		
Description		
he process starts when *		
Select One		*

- 2. Enter the following information.
 - The Process Name
 - The API name
 - A Description of the process
 - The Action trigger indicating when the process will begin
- 3. Click Save.
- 4. In the Process Builder page click Add Object.
- 5. Under Object, type the object that will be modified, for example, Contact or Lead.

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Expand All Collapse All		View	v All Processes Clone Edit Properties	Activate
START		Choose Object and Specify W	hen to Start the Process	0
+ Add Object		Object*		
		Contact 🔻		
↓ ○		Start the process*		
		 only when a record is created when a record is created or adited 		
+ Add Crheria TRUE				I
+ Add Action ③ Set Schedule		> Advanced		
FALSE + Add Action				
(STOP)				
		Save Cancel		

- 6. Click Save.
- 7. Click Add Criteria.
- 8. Define the criteria as Whenever a new lead is created for the action group.

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START Contact Write The UNINE	
+ Add others THUE -> IMMEDIATE ACTIONS TIME + Add Action FALSE + Add Action + Add	NS →→ ■ 302

9. Click Add Action . The Action fields appear.

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C Process Builder - Contact Creation		← Back To Setup ? Hel
Expand All Collapse All		View All Processes Clone Edit Properties Activate
START		Select and Define Action
Contact		Action Type * Create a Record Action Name * Action Name * Aconsent is created
contract s TRUE → IMMEDIAT ACTIONS LAPSE → SC contract + Add Action - - - FALSE + - - -	etSchedule add Action	Record Type * Consent Set Field Values Field * Troe * Value *
		Phone Number
+ Add Action FALSE FALSE HADRACION IMMEDIATE ACTIONS IMMEDIATE A	HEDULED ACTIONS →→ ■ STOP et Schedule lad Action	+ AUL HOW
STOP		Save Cancel

- 10. Enter the details, as required. Refer to the table below for more details.
- 11. Click Add Row to include additional fields.

FIELD	DESCRIPTION	
Action	Define the Action as: Create a Record.	
Action Name	Provide a name for the Action.	
Define Fields these fields need to be configured during the Compliance Configuration process.		
Mobile Number	Select the Mobile Number that is selected as the consent parameter for creating the consent record.	
Sender ID	Select the Sender ID that will be used to create the consent record. This field is important only if you select Sender ID as one of the parameters for creating the consent record. You may skip this field if it has not been defined as a parameter in your compliance configurations. In such a scenario consent record will be created irrespective of the Sender ID the request is received from.	
Content	Select the Content type for which the consent request will be created. You may skip this field if content type is not selected as a parameter to collect consent requests in your compliance configurations.	

Confirmation Config	Select the confirmation configuration ID from the Confirmation Config object. This ID comprises the Sender Id from which the confirmation message will be sent. This configuration is completed in Step 3 of the compliance configuration process and will be displayed for Opt-in, optout and double opt-in consent requests.
Do Not Send	Select this value as true if you do not
Confirmation	wish to send a confirmation message.
Compliance Status	Select the consent status that shall be recorded i.e. Opt-Out, Opt-In, etc. You will need to create multiple process builders to generate consent records with different compliance status.
Source	Select the source for generating the consent and set the value as Non-handset
Lead	Select Lead as a record field and select the value for the lead lookup. This can also be contact depending on which object you are selecting.

- 12. Click Save.
- 13. Click Activate and then click Confirm.
 - You can also import consents by creating a CSV with all the fields mentioned above. Click **Import** to start importing consents.